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Circular Letter

TO: STATE AGENCIES, AGRICULTURAL DISTRICTS, PUBLIC AGENCIES, STATE COLLEGES & UNIVERSITIES, COUNTY SUPERINTENDENT OF SCHOOLS

SUBJECT: NEW PROCEDURES FOR DISABILITY/INDUSTRIAL DISABILITY RETIREMENT APPLICATION PROCESS

The California Public Employees' Retirement System (CalPERS) is automating the business processes for the Disability and Industrial Disability Retirement Applications by using a Workflow System.

Workflow will enable CalPERS to streamline its processes by eliminating the manual procedure of routing and tracking paperwork to the appropriate business areas and allowing multiple designated users to access a member's record at the same time. The Retirement Applications, supporting documents and letters will be imaged and sent electronically to designated workstations for review and appropriate action, thereby improving processing time.

As of result of Workflow, the Disability/Industrial Disability Retirement Application process will need to change to ensure the documents required to make a disability determination are identified as they are being imaged. Correctly identifying the documents up-front means they will be sent to the correct Workflow destination in a timely manner. To assist with this, CalPERS' employers are being asked to make a change when submitting a job analysis, job duty statement or job description for their employees who apply for disability/industrial disability retirement benefits or in those instances where the employer is applying on behalf of the employee.

In the past, when an employee applied for disability/industrial disability retirement (with the exception of Local Safety employees), he/she was instructed to send his/her employer the Request for Employee Information (PERS-BSD-64) form located in the Disability Retirement Package. This form requests the employer to send CalPERS a copy of the most recent detailed job description for the positions held by that employee. CalPERS will now require the employer to attach the PERS-BSD-64 form to the top of all job analyses, job duty statements or job descriptions, as well as medical reports and other personnel documents such as POST orders, physical demand studies, accident reports and separation/termination documentation. This will enable Workflow to identify properly the documents received and ensure the appropriate destination of those documents.

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The Disability Retirement Application Package is currently being modified to include these new instructions and is expected to be released by Spring of 2003.

As always thank you for your continued support of CalPERS process changes, which will enable us to serve our customers better. If you have any questions, please contact the CalPERS Customer Call Center at 1-800-352-2238.

A handwritten signature in cursive script that reads "Kenneth W. Marzion".

Kenneth W. Marzion, Chief
Actuarial and Employer Services Division